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ABSTRACT

This digest summarizes issues raised in a research report on the academic rank of the emeritus professorship and retirement. Among the questions addressed are: What prompts an interest in the emeritus status? What trends presage its restructuring? What changes in the emeritus rank are likely? How might a new emeritus rank help solve problems of abolishing a compulsory retirement age? and What should colleges and universities do? The interest in emeritus status is now coinciding with the demise of compulsory retirement. Recent studies illustrate how personnel procedures can utilize fresh conceptions abut the meaning of emeritus status to the mutual benefit of faculty and institution. Trends show the number of emeriti is large and growing, they are becoming more assertive, and they are organizing. Changes in emeritus status would include a part-time working rank, the benefits of which would be negotiated on an individual basis within stated institutional policy. Several problems will emerge if compulsory retirement is abolished, such as making funding available for new teachers and getting rid of deadwood. It is recommended that universities start planning roles now for the emeritus role using the faculty senate as the planning vehicle. Contains 4 references. (GLR)

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The Emeritus Professor: Old Rank - New Meaning

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What Prompts an Interest in the Emeritus Status?

The new view of the emeritus professorship has important policy implications throughout higher education. The changes in progress regarding emeritus status are only beginning to be recognized nationally, though examples can be found on campuses in many states. Moreover, the changes take on special relevance for higher education planning now, when the emeritus rank may be converging with institutional practices, particularly those connected with tenure, retirement, benefits, part-time employment, and related matters under the impending condition of no compulsory retirement age. The confluence of two events—the birth of new vitality for the emeritus rank and the demise of compulsory retirement—may be fortuitous. The combination may help resolve some of the most perplexing dilemmas now being discussed.

When retirement is made desirable both by financial attractions and by benefits and privileges that are personally and academically satisfying, faculty members will decide to retire at their own volition, at any age. Alternatively, if highly valued senior faculty members are to be persuaded by administration to continue as part of the working faculty, it will be for the same reasons, namely, inducements that are personally and academically too difficult to resist. Recent studies about the emeritus rank delineate many of those attractions and inducements and illustrate how personnel procedures can utilize fresh conceptions about the meaning of emeritus status, to the mutual advantage of faculty and institution.

What Trends Presage Its Restructuring?

Several conditions that foreshadow change are evident in recent literature. The number of emeriti is large and growing. Emeriti are becoming more assertive about what they look upon as their rights. Recognition of emeriti is growing in policy statements of major professional organizations. Also, emeriti are organizing themselves and conducting conferences with themes arising from self-interest. Taken together, these conditions set the stage for a much more visible and more influential role for emeriti in higher education.

Organized emeriti groups are on record on the side of encouraging increased recognition from higher education institutions and greater participation by emeriti on campus. There are already acknowledged differences by colleges and universities in the recognition afforded retirees in general and those honored by the award of emeritus standing. The American Association of University Professors (AAUP) has recommended special prerequisites for emeriti to help maintain collegial campus contacts. Some collective bargaining agreements spell out qualifications for emeritus rank and recognize their special standing.

A sentiment prevails among responsible groups to pay attention to the fact that emeritus faculty have important contributions to make on their home campuses and elsewhere. The ongoing capability of many distinguished emeriti is readily demonstrable. For example, of the seven individuals who were the 1989 trustees of Teachers Insurance and Annuity Association/College Retirement Equities Fund (TIAA-CREF), three were university emeriti (Duke, North Carolina, Notre Dame). They held enormous responsibility as custodians and policy makers for one of the world's largest funds, an investment pool whose safeguarding is of immense importance to higher education.

Research on emeriti activities shows unequivocally that a professor who retires is no different in knowledge and skill the day after receiving the silver bowl at the retirement party from the day before. It can be predicted that any restructuring of the emeritus rank that upgrades the stature of emeriti and opens more opportunities for their participation in departmental and campus life would be welcomed.

What Changes in the Emeritus Rank Are Likely?

Essentially, the emeritus rank would become a part-time working rank for especially meritorious senior faculty, rather than solely an honorific rank reserved for those who have retired. The altered rank would carry full academic/professional standing and would provide for flexibility of conditions of employment. Transfer to that rank, with the details of responsibilities and rewards, would be negotiated on an individual basis within stated institutional policy.

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How Might a New Emeritus Rank Help Solve Problems of Abolishing a Compulsory Retirement Age?

According to the literature, several problems may be exacerbated when a compulsory retirement age no longer prevails, including:

- getting rid of deadwood if there is no compulsory retirement calendar date that makes it automatic;
- keeping highly productive faculty members from taking advantage of early retirement incentives meant for others;
- continuing to pay high salaries to older professors and still find funds to hire younger ones;
- making room for younger new hires even if the funds are not available to employ them;
- containing the mounting costs of fringe benefits; and
- limiting institutional retirement fund contributions if there is no mandated ceiling.

These and other related problems will not all be solved immediately by assigning new meaning and function to the emeritus rank. It should be possible, however, to cushion the impact of some of the problems by making phased retirement more desirable for more-valued faculty members, upgrading evaluation standards and procedures to weed out unsatisfactory performers, and making early retirement more desirable for satisfactory but less productive colleagues.

What Should Colleges and Universities Do?

It would be in the institution's interest to position itself in planning about roles for emeritus professors as a partner with the present emeritus faculty body and with emeriti-soon-to-be. Some schools are already well along in such planning for the decade ahead, but many have yet to begin. The faculty senate could be the vehicle of choice in which to vest the planning function and operations, at least at first, in cooperation with the administrative planning office.

Basic data useful for planning about emeriti consist largely of information about the emeriti. Yet many institutions have little hard data bearing on the intentions and aspirations of either active faculty or emeriti. That is especially noteworthy because the emeriti themselves are generally interested in and willing to help garner and analyze such data.

Now may be the time for a significant change in the meaning, the function, and the utilization of the emeritus professor in colleges and universities. The impetus for change comes chiefly from emeriti themselves. The timeliness of the change comes from the pressing need to accommodate changes resulting from the abolition of a compulsory retirement age for tenured faculty. The proposed new meaning and functions of the emeritus rank are designed to help keep highly valued senior faculty members active on campus into their later years, to everyone's advantage and at reduced cost to the institution.

Selected References

Albert, Sydney P. July-August 1986. "Retirement: From Rite to Rights." *Academe* 72: 24-26. The aim of the emeriti movement is to establish emeriti as full continuing members of the academic community. A number of emeriti centers and associations are described. A "Bill of Rights" for emeriti is proposed consisting of appropriate, but not exhaustive, rights and privileges which institutions ought to grant to their emeriti faculty.

Benjamin, Ernst. Spring 1988. "Pensions, Retirement, and Tenure: What Can Faculty Expect in the Future?" *Footnotes* Washington, D.C. American Association of University Professors. With uncapping, previously satisfactory retirement patterns, pension arrangements, and tenure principles and practices can no longer be taken for granted. Study groups are currently reviewing these matters, including legal research and prospective options, leading to possible policy consensus.

Blum, D.E. 1988. "UCLA's Emeriti Association Shows 'There Is Life Beyond Retirement'." *The Chronicle of Higher Education* October 26, 1988. A16-A17. Members have available a host of benefits on campus that are tailored to individuals, from continuing biological research or writing a law dictionary to teaching and counseling students or conducting pre-retirement seminars. Administrators and professors join in calling emeriti benefits a two-way street.

Holden, Karen C. and Hansen, W. Lee. ed. 1989. *The End of Mandatory Retirement: Effects on Higher Education.* San Francisco: Jossey-Bass. In eight chapters a number of authors discuss how uncapping and recent changes in the tax law alter the traditional structure of pensions, the meaning of normal retirement, the implications for tenure, feasibility, and legality of retirement policy changes in the new legal environment.

This ERIC digest is based on a new full-length report in the *ASHE-ERIC Higher Education Report* series, prepared by the ERIC Clearinghouse on Higher Education in cooperation with the Association for the Study of Higher Education, and published by the School of Education at the **George Washington University.** Each report is a definitive review of the literature and institutional practice on a single critical issue. Many administrators subscribe to the series and circulate reports to staff and faculty committees with responsibility in a report's topic area. Reports are available through subscriptions for $80 per year ($90 outside the U.S.). Subscriptions begin with Report 1 and conclude with Report 8 of the current series year. Single copies, at $17 each, are available from: *ASHE-ERIC Higher Education Reports,* **The George Washington University,** One Dupont Circle, Suite 630, Washington, DC 20036-1183. Or phone (202) 296-2597.

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